United Nations ST/AI/2018/1

Secretariat

1 January 2018

Administrative instruction

Education grant and related benefits

The Under-Secretary-General for Management, pursuant to section 4.2 of Secretary-General's bulletin ST/SGB/2009/4, and for the purpose of implementing staff regulation 3.2 and staff rule 3.9 (see ST/SGB/2018/1), promulgates the following:

Section 1
Purpose

The purpose of the education grant and related benefits is to provide eligible staff members serving outside their home country in accordance with staff regulation 3.2 and staff rule 3.9 (a) (iii) with financial support to cover part of the cost of educating a child in full-time attendance at an educational institution.

Section 2
Eligibility

2.1 The eligibility requirements described in the present section apply to the education grant and related benefits, which consist of the reimbursement of capital assessment fees and a lump sum for boarding assistance.

Education grant and reimbursement of capital assessment fees

2.2 A staff member is eligible to receive the education grant and be reimbursed for capital assessment fees when the staff member meets all of the following conditions:

(a) Is an international recruit under staff rule 4.5;

(b) Holds a fixed-term, continuing or permanent appointment;

(c) Serves outside the recognized home country in accordance with staff regulation 3.2 and staff rule 3.9;[1]

[1] In accordance with section 5.5 of the administrative instruction on the visa status of non-United States staff members serving in the United States, members of their household and their household employees, and staff members seeking or holding permanent resident status in the United States (ST/AI/2000/19), non-United States staff members who sign the waiver in order to acquire permanent resident status in the United States will lose any entitlements they would otherwise have had to international benefits under the Staff Rules by virtue of serving at a duty station outside the country of their nationality (i.e., home leave, education grant, repatriation grant), but only from the date on which they are granted permanent resident status as shown on their alien registration card and not from the date on which they sign the waiver.

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(d) Has a child in full-time attendance at an educational institution at the primary level or above.

2.3 Education is deemed "primary" for the purposes of the present instruction when the child is 5 years of age or older at the beginning of the academic year, or when the child reaches the age of 5 within three months of the beginning of the school year. In exceptional circumstances, a lower minimum age of eligibility to receive the education grant may be accepted if the child is required by law to commence formal primary education at an earlier age.

2.4 Capital assessment fees are mandatory non-refundable fees levied by educational institutions to fund the construction, upgrade, refurbishment and maintenance of buildings. Such fees, which may also be known as building levies, funds or fees, capital levies, funds or fees, first-time parent fees, incorporation fees or development fees, may be levied: (a) as a one-time payment for a first-time enrolling child; (b) every year; or (c) as needed.

Boarding assistance

2.5 A staff member is eligible to receive boarding assistance, including in relation to a child attending a school that charges no fees or a nominal fee, when all of the following conditions are met:

(a) The requirements of section 2.2 are met;

(b) The staff member serves at a duty station with a hardship classification of A to E;

(c) The child attends an educational institution at the primary or secondary level;

(d) The educational institution in which the child is being educated is located outside the country of the duty station and beyond commuting distance from the area where the staff member is serving, notwithstanding national boundaries;

(e) The child does not live with the other parent.

2.6 A staff member may, in exceptional circumstances, receive boarding assistance with respect to a child who attends an educational institution at the primary or secondary level located within the country of the duty station but beyond commuting distance from the area where the staff member is serving and where, in the opinion of the Secretary-General, no educational institution within commuting distance from the area where the staff member is serving would be suitable for the child.

2.7 In order to avoid disrupting the continuity of the education of a child who is boarding to attend school at the primary or secondary level, a staff member is eligible for boarding assistance if one of the following conditions is met:

(a) The staff member is serving in a category H duty station[2] and is in receipt of boarding assistance for the academic year in progress on 1 January 2017 and the child remains at the same school beyond that date;

(b) The staff member is assigned, reassigned or transferred from a duty station with a hardship classification of A to E to a headquarters duty station during the school year in progress on 1 January 2018, and the child remains at the same school.

[2] All duty stations are placed by the International Civil Service Commission into one of six categories: H and A to E. Duty stations in category H are headquarters and similarly designated locations where the United Nations has no development or humanitarian assistance programme, or locations in countries that are members of the European Union. The A to E categories comprise all other duty stations, classified by order of difficulty of conditions of life and work.

2.8 The measures provided for in section 2.6 shall cease to apply when the child changes school.

Exclusions and cessation of the entitlement

2.9 Family members are not authorized to reside with a staff member assigned to non-family duty stations. Consequently, a staff member shall not be eligible for an education grant and related benefits in respect of a child attending an educational institution at a non-family duty station.

2.10 A staff member ceases to be eligible for an education grant and related benefits when the child in respect of whom the entitlement is received meets one of the following conditions:

(a) The child ceases to be in full-time attendance at an educational institution;

(b) The child completes four years of post-secondary studies or is awarded a first recognized post-secondary degree, whichever comes first. The four years of post-secondary studies are counted cumulatively from the first year of studies following the high school diploma even if part of the post-secondary studies is completed prior to the staff member's service with the Organization;

(c) The child reaches the age of 25, in which case the entitlement shall cease at the end of the academic year in which the child turns 25.

2.11 In the event that the child's education is interrupted for a period of at least one academic year by compulsory national service, illness or any other compelling reason, the period of eligibility may be extended for the period of interruption beyond the academic year in which the child reaches the age of 25.

Section 3
Admissible and non-admissible educational expenses

Admissible expenses

3.1 The education grant is computed on the basis of the following admissible expenses:

(a) Mandatory enrolment-related fees, which are required for the enrolment of a child in an educational institution. Such fees include but are not limited to admission, application, registration, enrolment, matriculation, orientation and assessment or examination fees;

(b) Tuition for full-time attendance that is paid directly to the educational institution and certified by the educational institution as being necessary for attendance;

(c) Tuition in the mother tongue of the staff member if all of the conditions below are met:

(i) Instruction is given by a qualified teacher certified in the language of instruction who is not a member of the staff member's family;

(ii) The staff member serves in a country whose language is different from the staff member's mother tongue;

(iii) The child attends a local educational institution in which the instruction is given in a different language from the staff member's mother tongue;

If both parents are United Nations staff members, tuition can be in either or all of the mother tongues as defined by the staff members upon initial appointment or based on their recognized nationality in the case of multiple mother tongues;

(d) Expenses for distance learning, including blended learning, when prior written approval is obtained and such courses meet one of the following conditions:

(i) They are the only available substitute for full-time attendance at an educational institution of a type not available at the duty station;

(ii) They are related to academic subjects that are not included in the regular curriculum but are required for the child's subsequent education;

(e) Following certification by the school, expenses for private tuition provided by a teacher who is qualified in the subject concerned and is not a member of the staff member's family when one of the following conditions is met:

(i) A child attends a local educational institution, and tuition in the language of the duty station is a precondition for admittance;

(ii) A supplement to correspondence courses for which expenses are admissible under section 3.1 (d) above is required;

(iii) A supplement to the regular programme is required for special coaching in an academic subject taught by the educational institution to make up for deficiencies attributable to the child's change of schooling as a result of expatriation or a change of the staff member's official duty station, or for special coaching in an academic subject not included in the educational institution curriculum but required for the child's subsequent education;

(f) Enrolment and tuition expenses for an apprenticeship or other similar arrangement when the educational institution certifies that any work placement is an integral part of the full-time curriculum and on the condition that the child receives no salary or remuneration for services rendered;

(g) Enrolment and tuition expenses for summer courses when the educational institution certifies that such courses are a prerequisite for further attendance during the subsequent regular academic year and for the institution's regular diploma. When admissible, expenses for summer courses are reimbursed as part of the admissible expenses incurred for the prior academic year, subject to the maximum claim amount.

Non-admissible expenses

3.2 All other educational expenses that are not listed in section 3.1 above shall be deemed non-admissible.

Reimbursement rates and amounts

3.3 Admissible expenses listed in section 3.1 above shall be reimbursed according to the global sliding scale below, regardless of the currency and the country in which the expenses are incurred.

Global sliding scale

Admissible expenses (United States dollars)	*Maximum amount for calculation (United States dollars)*	*Reimbursement rate (percentage)*	*Maximum reimbursement amount (United States dollars)*
0–11 600	11 600	86	9 976
11 601–17 400	5 800	81	4 698
17 401–23 200	5 800	76	4 408

Admissible expenses (United States dollars)	*Maximum amount for calculation (United States dollars)*	*Reimbursement rate (percentage)*	*Maximum reimbursement amount (United States dollars)*
23 201–29 000	5 800	71	4 118
29 001–34, 800	5 800	66	3 828
34 801–40 600	5 800	61	3 538
40 601 and above	–	–	–

3.4 Eligible staff members are entitled to a maximum amount of education grant of $30,566 per child, per academic year, regardless of the number of claims submitted.[3]

Scholarships, bursaries or similar grants

3.5 All scholarships, bursaries or similar grants received by or for the child shall be deducted first from those expenses that are not admissible under section 3.2, and the balance, if any, from the admissible educational expenses under section 3.1 before the amount of the grant is computed. Any remaining balance will be deducted from the education grant and related benefits. A staff member shall bear at least 14 per cent of the cost of admissible expenses.

3.6 Financial assistance in the form of loans to assist in the payment of educational expenses, which must be reimbursed by the staff member or the child to a financial institution, is not considered to be a scholarship, bursary or similar grant.

Section 4
Boarding assistance

4.1 Eligible staff members shall receive boarding assistance in the form of a lump-sum payment of $5,000 per child, per academic year, regardless of the amount of actual boarding-related expenses incurred. The lump sum shall be paid in addition to any reimbursement computed under section 3.3 above.

Section 5
Reimbursement of capital assessment fees

5.1 Capital assessment fees shall be reimbursed at 100 per cent in addition to the education grant upon certification from the educational institution that all of the following conditions are met:

(a) The purpose of the fees is consistent with the description provided in section 2.4 above;

(b) The child's enrolment or continued enrolment is conditional upon the payment of the fees.

Section 6
Prorating of amount of the education grant and related benefits

6.1 The amount payable to a staff member for the education grant, the reimbursement of capital assessment fees and boarding assistance shall be prorated

[3] This applies to a staff member who is separated and reappointed by an organization of the United Nations common system and as a result submits multiple claims within the same academic year.

according to any of the following conditions, which are not mutually exclusive and may be combined:

(a) Where the period of attendance or boarding at an educational institution covers less than two thirds of the academic year, the amount of the grant and related benefits shall be prorated on the basis of the period of attendance or boarding, as applicable, compared to the full academic year.[4] In the case of post-secondary studies where attendance is determined by semester, any educational expenses corresponding to the semester in which a child is not in full-time attendance shall be considered non-admissible and shall not be included in the computation of the education grant;

(b) Where a staff member who is eligible for the grant and related benefits at the beginning of the academic year separates from service and the period of eligible service covers less than two thirds of the academic year, the amount of the grant and related benefits shall be prorated on the basis of the period of eligible service compared to the full academic year;

(c) Where a staff member's service with the Organization or eligibility for the education grant and related benefits commences after the beginning of the academic year, the amount of the grant and related benefits shall be prorated on the basis of the period of eligible service compared to the full academic year. No expenses relating to the period of educational institution attendance prior to the date of appointment of a staff member, or date of eligibility for education grant, shall be reimbursed;

(d) Where a staff member is on special leave without pay, the amount of the grant and related benefits shall be prorated on the basis of the period of eligible service compared to the full academic year;

(e) Where a staff member works on a part-time basis, the amount of the grant and related benefits shall be prorated on the basis of the eligible service compared to the full academic year.

6.2 Notwithstanding the provisions of section 6.1, the amount payable for the reimbursement of non-refundable capital assessment fees shall not be prorated, regardless of the duration of the attendance, when a staff member changes duty station during the academic year and the child has to change educational institutions as a result of the staff member's change of duty station. In the event that the staff member is required to pay a capital assessment fee to the new educational institution, no prorating shall apply.

6.3 When prorating is required, the amounts shall be computed on the basis of calendar days and expressed as a percentage of the number of calendar days of attendance or eligible service over the total number of calendar days of the educational institution's academic year. When the educational institution charges fees at different rates for various parts of the year, this shall be reflected in prorating the amount payable.

6.4 In accordance with staff rule 3.9 (f), when a staff member dies while in service at or after the beginning of the academic year, the education grant and related benefits shall be paid in full for that academic year.

6.5 In accordance with section 11.2 of the administrative instruction on unsatisfactory conduct, investigations and the disciplinary process (ST/AI/2017/1), a decision to place a staff member on administrative leave without pay shall be without

[4] Full-time attendance is determined by the certification provided by the school. When the child is in full-time attendance for two thirds or more of the academic year, the child is considered to have been in full-time attendance for the full year and no prorating applies.

prejudice to the continuation of any education grant to which the staff member may be entitled.

Section 7
Request for advances

7.1 An eligible staff member who is required to pay all or a portion of the full-time educational institution attendance expenses at the beginning of the academic year may request an advance against the entitlement, including capital assessment fees and boarding assistance.

7.2 Any paid advance shall be considered as due from the staff member until the claim for payment of the education grant and related benefits has been received and processed or until the advance is recovered from the staff member. Staff members are required to submit their claims for payment promptly, as required by section 8 of the present instruction. Recovery from the staff member's emoluments shall take place after the third month of the end of the academic year or upon separation from service, whichever comes first.

7.3 A staff member shall not be entitled to the payment of any education grant and related benefits under the present instruction or under that on the special education grant until any and all outstanding advances against the education grant and related benefits have been settled, by receipt and processing of the relevant claims by the Organization and/or by recovery of any and all outstanding balances.

Section 8
Claims for payment of the education grant and related benefits

8.1 A staff member shall submit a claim for payment of the education grant and related benefits as follows:

(a) Within two months upon completion of the academic year;

(b) Upon cessation of the child's attendance;

(c) Before the date of separation.

8.2 Claims for payment of the education grant and related benefits shall be submitted in accordance with the procedures set out in information circular ST/IC/2018/7.

Section 9
Education grant travel

9.1 Under staff rule 3.9 (g), a staff member who is eligible for boarding assistance shall be entitled to travel expenses for the child for one round trip each academic year between the primary or secondary educational institution and the staff member's duty station, subject to all of the following conditions:

(a) The child's attendance at the educational institution is at least two thirds of the academic year;

(b) The travel is undertaken during the academic year or within three months of the beginning or end of the academic year;

(c) The child spends at least seven days at the staff member's duty station.

9.2 In the event that the staff member dies while in service at or after the beginning of the academic year, the entitlement to education grant travel shall continue until the end of the academic year and may be authorized for travel between the educational institution and the duty station, or another location, subject to the maximum allowed under section 9.3 below.

9.3 Education grant travel expenses are covered up to the cost of travel between the staff member's home country and the staff member's duty station.

9.4 Where the staff member is serving at a non-family duty station or in cases where the child cannot travel to the staff member's duty station, the staff member or the staff member's spouse may be authorized to travel in lieu of the child, provided that the staff member or the spouse spends a minimum of seven days at the location of the child's educational institution.

9.5 When the staff member or the spouse travels in lieu of the child, all of the following conditions shall apply:

(a) The travel expenses borne by the Organization shall not exceed the amount that would have been paid for the child or children;

(b) No travel time shall be granted and all working days away from the office shall be charged to annual leave;

(c) For administrative purposes, such travel shall be charged as education grant travel.

9.6 When the staff member or the spouse travels in lieu of the child, other children for whom an education grant travel entitlement exists may travel between the location of their educational institution and the location to be visited by the parent, provided that the expenses borne by the Organization do not exceed the maximum that would otherwise have been applicable.

9.7 When a child attends two educational institutions during a single academic year, one at the duty station and the other away from the duty station, education grant travel may be authorized if the child's attendance at the educational institution away from the duty station is for a period of at least one term or semester.

Section 10
Supporting documentation

10.1 A staff member is required to provide supporting documentation for all requests for an advance or claims for payment of the education grant and related benefits. The staff member is responsible for the completeness and accuracy of the documentation submitted. Documentation provided by an educational institution may not be altered in any way.

10.2 A staff member shall retain, for a period of five years from the date of submission of the claim for payment, all relevant documentation, such as documentation provided by the educational institution, medical records, outcomes of applications for benefits provided by States, local governments and medical insurance, invoices, receipts, cancelled cheques and bank statements documenting expenditure.

10.3 When submitting a request for an advance or a claim for payment, staff members attest to:

(a) The correctness of the information provided;

(b) Their understanding of the obligation to retain the documentation for the period specified under section 10.2 and to submit it upon request for monitoring and compliance purposes;

(c) Their understanding of the obligation to inform the Organization of any changes in the information or estimates provided in support of the request;

(d) Their understanding that the Organization may conduct a compliance review of the request or claim;

(e) Their understanding of the consequences of submitting incomplete, unsubstantiated or false information as discussed in section 10.4 below.

10.4 A staff member may be required to provide supporting documentation in its original form or scanned copies that are certified as having been seen by a United Nations official. Providing incorrect information or failing to provide the requested information within the applicable time frame or to report changes or alterations to the documentation provided by the educational institution may result in one or more of the following:

(a) Rejection of the claim;

(b) Recovery of prior payments for education grant and related benefits;

(c) Any other administrative and/or disciplinary measures in accordance with staff rule 10.2, including dismissal for misconduct.

Section 11
Final provisions

11.1 The present instruction shall govern the administration of the education grant and related benefits as of the academic year in progress on 1 January 2018.

11.2 Administrative instructions ST/AI/2011/4 of 27 May 2011, ST/AI/2011/4/Amend.1 of 30 December 2011 and ST/AI/2011/4/Amend.2 of 31 March 2014 are hereby abolished.

(*Signed*) Jan **Beagle**
Under-Secretary-General for Management

United Nations ST/AI/2018/2

Secretariat

1 January 2018

Administrative instruction

Special education grant and related benefit for children with a disability

The Under-Secretary-General for Management, pursuant to section 4.2 of Secretary-General's bulletin ST/SGB/2009/4, and for the purpose of implementing staff regulation 3.2 (a) and staff rule 3.9 (see ST/SGB/2018/1), promulgates the following:

Section 1
Purpose

1.1 The purpose of the special education grant and related benefit is to provide an eligible staff member with financial support to contribute to the costs related to the education of a child with a disability.

Section 2
Eligibility

2.1 A staff member in any category holding an appointment other than temporary is eligible for the special education grant and related benefit (i.e. reimbursement of capital assessment fees), including when serving in the recognized home country.

Section 3
Conditions of entitlement

3.1 The special education grant and related benefit is available to an eligible staff member provided that:

(a) The Medical Services Division of the Office of Human Resources Management certifies that the child:

(i) Is unable, by reason of physical or mental disability, to attend a regular educational institution and therefore requires special teaching or training, on a full or part-time basis, to prepare him or her for full integration into society; or

(ii) While attending a regular educational institution, requires special teaching or training to assist him or her in overcoming the disability; and

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(b) The staff member demonstrates that she or he has exhausted all other sources of benefits that may be available for the education and training of the child, including those provided by States, local governments and medical insurance.

3.2 The entitlement commences from the beginning of the school year in progress when the need for special teaching or training is certified, unless the certificate indicates a different date, or from the date the staff member becomes eligible.

Section 4
Exclusions and cessation of entitlement

4.1 A staff member assigned to a non-family duty station is not authorized to be accompanied by family members. Consequently, a staff member shall not be eligible for a special education grant and related benefit in respect of a child attending an educational institution at a non-family duty station.

4.2 A staff member ceases to be eligible for the special education grant and related benefit when the child in respect of whom the staff member was in receipt of the entitlement:

(a) Ceases to be in full-time attendance at an educational institution; or

(b) Is awarded the first recognized post-secondary degree or up to the end of the academic year in which the child reaches the age of 28, whichever is earlier.

Section 5
Special education grant: admissible educational expenses

5.1 The special education grant will be computed on the basis of the following educational expenses:

(a) Expenses required to provide an educational programme designed to meet the needs of a child with a disability so that he or she may attain the highest level of functional ability. Those expenses may include:

(i) Expenses for special teaching or training services;

(ii) Other expenses, including tuition, enrolment-related fees and the purchase of textbooks and meals at school, which are directly related to mandatory educational programmes and not related to extracurricular activities;

(iii) Expenses for special equipment required to meet the child's educational needs;

(iv) Expenses for full board (food and lodging), including in the case of a child attending an educational institution at the duty station when such boarding is an integral part of the educational programme;

(b) Expenses incurred for local transportation required by the child with a disability as certified by the Medical Services Division.

5.2 All other expenses that are not listed in section 5.1 above, including expenses covered or partially covered by medical insurance, shall be deemed non-admissible.

Section 6
Amount of the grant

6.1 The admissible educational expenses actually incurred for each child with a disability who is unable to attend a regular educational institution, or who attends on a full-time basis a regular educational institution that provides the necessary special arrangements, will be reimbursed at 100 per cent, subject to the following:

(a) The overall maximum amount of the grant shall be equal to the upper limit of the top bracket of the global sliding scale applicable to the education grant scheme indicated in paragraph 2 (a) of the annex to the present instruction;

(b) If the child is boarding for the purpose of attending an educational institution, the amount equivalent to the boarding lump sum of the education grant scheme and related benefits will be added to the overall maximum amount mentioned in section 6.1 (a) above, as indicated in paragraph 2 (b) of the annex.

6.2 When the expenses for full-time attendance at a regular educational institution are reimbursed under the regular education scheme governed by the provisions of administrative instruction ST/AI/2018/1, admissible educational expenses incurred for special teaching and training outside the educational institution and for boarding shall be reimbursed at the 100 per cent rate. The combined total of the two grants shall not exceed the amount specified in paragraphs 2 (a) or 2 (b) of the annex, as applicable.

6.3 If a staff member is not entitled to the regular education grant for the child in full-time attendance at a regular educational institution, admissible educational expenses incurred for special teaching and training outside a regular educational institution will be reimbursed against the special education grant at the 100 per cent rate, subject to the maximum amount specified in paragraph 2 (a) of the annex.

6.4 Equipment for educational purposes in all cases will be reimbursed up to a maximum of two thirds of the amount payable for the flat sum for boarding within the applicable maximum amount mentioned in section 6.1 (a) above.

6.5 The amount of admissible educational expenses shall be reduced by the amount of any benefits that may be available from other sources, including scholarships, bursaries or similar grants for the child's special education and training, which shall be reported in line with section 3.1 (b) above.

6.6 All scholarships, bursaries or similar grants received by or on behalf of the child shall be deducted first from those expenses that are not admissible, and the balance, if any, shall be deducted from the admissible educational expenses before the amount of the grant is computed. Any remaining balance will be deducted from the special education grant-related benefit.

6.7 Financial assistance in the form of loans to assist in the payment of educational expenses, which have to be repaid to a financial institution by the staff member or the child, are not considered to be scholarship, bursary or similar grants.

Section 7
Reimbursement of capital assessment fees

7.1 Capital assessment fees are mandatory non-refundable fees levied by educational institutions to fund the construction, upgrade, refurbishment and maintenance of buildings. Such fees, also known as building levies/funds/fees, capital levies/funds/fees, first-time parent fees and development fees, may be levied as a one-time payment upon initial enrolment, on an annual basis or on an as needed basis.

7.2 Capital assessment fees will be reimbursed at 100 per cent, in addition to the special education grant, upon certification from the institution that:

(a) The purpose of the fees is consistent with the description provided in section 7.1 above;

(b) The child's enrolment in the institution is conditioned upon the payment of the fees.

Section 8
Proration of amounts of the special education grant and related benefit

8.1 The amount payable to a staff member for the special education grant and the reimbursement of capital assessment fees shall be prorated according to any of the following conditions, which are not mutually exclusive and may be combined:

(a) Where the child attends an educational institution or is in boarding for less than two thirds of the academic year, the amount of the grant and related benefit shall be prorated on the basis of the period of attendance compared with the full academic year.[1] In the case of post-secondary studies where attendance is determined by semester, any educational expenses corresponding to the semester in which the child is not in full-time attendance are considered non-admissible and are not included in the computation of the special education grant;

(b) Where a staff member who is eligible for the grant and related benefit at the beginning of the academic year separates from service and the period of eligible service covers less than two thirds of the academic year, the amount of the grant and related benefit shall be prorated on the basis of the period of eligible service compared with the full academic year;

(c) Where a staff member's service with the Organization or eligibility for the grant and related benefit commences after the beginning of the academic year, the amount of the grant and related benefit shall be prorated on the basis of the period of eligible service compared with the full academic year. No expenses relating to the period of educational institution attendance prior to the date of appointment of a staff member or the date of eligibility for the grant shall be reimbursed;

(d) Where a staff member is on special leave without pay, the amount of the grant and related benefit shall be prorated on the basis of the period of eligible service compared with the full academic year;

(e) Where a staff member works on a part-time basis, the amount of the grant and related benefit shall be prorated on the basis of the eligible service compared with the full academic year.

8.2 Notwithstanding the provisions of section 8.1 above, the amount payable for the reimbursement of non-refundable capital assessment fees shall not be prorated, regardless of the duration of attendance, when a staff member changes duty stations during the course of the academic year and the child has to change educational institutions as a result of the staff member's movement. Should such change trigger a payment of capital assessment fees to the new institution, no proration shall apply.

8.3 When prorating is required, it will be computed on the basis of calendar days and expressed as a percentage of the number of calendar days of attendance or eligible

[1] Full-time attendance is determined on the basis of the certification provided by the school. When the child is in full-time attendance for two thirds or more of the academic year, the child is considered to have been in full-time attendance for the full year and no proration applies.

service over the total number of calendar days of the academic year of the educational institution. When the educational institution charges fees at different rates for various parts of the year, this shall be reflected in the prorating of the amount of the grant.

8.4 In accordance with staff rule 3.9 (f), when a staff member dies while in service at or after the beginning of the academic year, the special education grant and related benefit shall be paid in full for that academic year.

8.5 In accordance with section 11.2 of the administrative instruction on unsatisfactory conduct, investigation and the disciplinary process (ST/AI/2017/1), a decision to place a staff member on administrative leave without pay shall be without prejudice to the continuation of any special education grant to which the staff member may be entitled.

Section 9
Request for advances

9.1 An eligible staff member required at the beginning of the academic year to pay all or a portion of the expenses for full-time attendance at an educational institution may request an advance against the entitlement, including the reimbursement of capital assessment fees.

9.2 Any advance paid shall be considered as due from a staff member until the claim for payment of the special education grant and related benefit has been received and processed or until the advance is recovered from the staff member. A staff member is required to submit the claim for payment promptly, in accordance with section 10.1 of the present instruction. Recovery from the staff member's emoluments shall take place after the third month following the end of the academic year or upon separation from service, whichever comes first.

9.3 A staff member shall not be entitled to the payment of any special education grant and related benefit under the present instruction or the instruction on the education grant and related benefits (ST/AI/2018/1) until any and all outstanding advances have been settled, either through the receipt and processing of the relevant claims by the Organization and/or the recovery of any and all outstanding balances.

9.4 Requests for advances shall be made in accordance with the procedures set out in information circular ST/IC/2018/7.

Section 10
Claims for payment

10.1 A staff member shall submit a claim for payment of the special education grant and related benefit as follows:

(a) Within two months upon completion of the academic year;

(b) Upon cessation of the child's attendance;

(c) Before the date of separation.

10.2 Claims for payment of the special education grant and related benefit shall be submitted in accordance with the procedures set out in information circular ST/IC/2018/7.

Section 11
Travel

11.1 When the needs of a child with a disability require that the child attend an educational institution outside the duty station or beyond commuting distance from the duty station, notwithstanding national borders, travel expenses shall be paid for up to two round trips per school year between the educational institution and the duty station.

11.2 In exceptional circumstances, travel expenses may also be reimbursed for one person accompanying the child with a disability who cannot travel alone owing to the disability.

Section 12
Supporting documentation

12.1 A staff member is required to provide supporting documentation for a request for an advance or a claim for payment of the special education grant and related benefit. The staff member is responsible for the completeness and accuracy of all documentation submitted. Documentation provided by an educational institution may not be altered in any way.

12.2 A staff member shall retain, for a period of five years from the date of submission of a claim for payment, all relevant documentation, such as documentation provided by the educational institution, medical records, documentation showing the outcome of applications for benefits provided by States, local governments and medical insurance, and invoices, receipts, cancelled cheques and bank statements documenting expenditures.

12.3 When submitting a request for an advance or a claim for payment, a staff member attests to:

(a) The correctness of the information provided;

(b) Understanding of the obligation to retain the documentation for the period specified in section 12.2 above and to submit it upon request for monitoring and compliance purposes;

(c) Understanding of the obligation to inform the Organization of any changes in the information or estimates provided in support of their requests;

(d) Understanding that the Organization may conduct a compliance review of the request or claim;

(e) Understanding of the consequences of submitting incomplete, unsubstantiated or false information, as indicated in sections 12.4 below.

12.4 A staff member may be required to provide supporting documentation in its original form or scanned copies that are certified as having been seen by a United Nations official. Providing incorrect information or failing to provide the requested information within the applicable time frame or to report changes or alterations to the documentation, may result in one or more of the following:

(a) Rejection of the claim;

(b) Recovery of prior education grant, special education grant and related benefit payments;

(c) Any other administrative and/or disciplinary measure in accordance with staff rule 10.2, including dismissal for misconduct.

Section 13
Final provisions

13.1 The present instruction shall govern the administration of the special education grant and related benefit as of the academic year in progress on 1 January 2018 and beyond.

(*Signed*) Jan **Beagle**
Under-Secretary-General for Management

Annex

Global sliding scale for the education grant

1. The global sliding scale for the education grant is presented in the table below:

Admissible expenses (United States dollars)	*Maximum amount for calculation (United States dollars)*	*Reimbursement rate (percentage)*	*Maximum reimbursement amount (United States dollars)*
0–11 600	11 600	86	9 976
11 601–17 400	5 800	81	4 698
17 401–23 200	5 800	76	4 408
23 201–29 000	5 800	71	4 118
29 001–34 800	5 800	66	3 828
34 801–40 600	5 800	61	3 538
40 601 and above	–	–	–

2. The maximum special education grant is:

   (a) $40,600 without boarding;

   (b) $45,600 with boarding.

United Nations ST/AI/2018/3

Secretariat

1 January 2018

Administrative instruction

Rental subsidies and deductions

The Under-Secretary-General for Management, pursuant to section 4.2 of the Secretary-General's bulletin ST/SGB/2009/4, and for the purpose of defining the terms and conditions of rental subsidies and deductions, as part of the post adjustment system under staff rules 3.7 and 3.18, hereby promulgates the following:

Section 1
General provisions

1.1 The purpose of the rental subsidy is to facilitate the settlement of new staff members and to encourage mobility within the common system by subsidizing the rental costs of eligible staff members.

1.2 The present instruction is structured as follows:

(a) Part I: eligibility requirements for rental subsidy;

(b) Part II: terms and conditions of the scheme applicable at all duty stations, unless otherwise specifically stated;

(c) Part III: additional terms and conditions applicable at group 1 duty stations, as designated by the International Civil Service Commission (ICSC);

(d) Part IV: additional terms and conditions applicable at group 2 duty stations, as designated by ICSC;

(e) Part V: terms and conditions under which a rental subsidy may exceptionally be paid to internationally recruited General Service staff members.

Part I
Eligibility requirements for rental subsidy

Section 2
Eligibility

2.1 The present instruction shall apply to the following:

(a) Staff members in the Professional and higher categories who are regarded as international recruits under staff rule 4.5;

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(b) Staff members in the Field Service category who are regarded as international recruits under staff rule 4.5;

(c) Internationally recruited General Service staff members who meet the conditions specified in part V of the present instruction;

(d) Staff members in the General Service and related categories who are temporarily assigned to positions in the Professional category and in the Field Service category and when the assignment involves a change of official duty station as per staff rule 4.8.

2.2 Eligible staff members may receive rental subsidy when they are authorized by the Organization to proceed on travel on appointment or assignment that involves relocation from beyond commuting distance, even when the travel is within the same country. The commuting distance at duty stations should be established by the local administrative or human resources offices by taking into account the local conditions at the duty station. In New York, the reasonable commuting distance shall be a 50-mile radius from the United Nations Headquarters premises.

2.3 Staff members recruited locally at the duty station in accordance with staff rule 4.5 (b) may be considered eligible for rental subsidy, provided all applicable conditions are met.

2.4 No rental subsidy shall be paid for rented accommodation at the duty station where the staff member is on assignment and in receipt of a daily subsistence allowance.

2.5 Staff members who are assigned to a new duty station, on an assignment that involves a change of official duty station, with a lower post adjustment than at the previous official duty station where they had been serving, and who, under staff rule 3.7 (c), continue to receive the post adjustment at the previous official duty station for a maximum period of six months, shall remain eligible to receive a rental subsidy for rented accommodation at the previous official duty station during that period. No rental subsidy shall be paid for rented accommodation at the new official duty station while a rental subsidy is paid for rented accommodation at the previous official duty station.

2.6 Staff members who are appointed at group 1 duty stations shall be eligible to receive the rental subsidy in accordance with part III below, taking into account previous continuous residence at the duty station immediately preceding the appointment.

2.7 Staff members who are appointed at group 2 duty stations shall be eligible to receive the rental subsidy for the duration of their assignment in accordance with part IV below.

2.8 For duty stations in group 1, when a change of official duty station or a new appointment involves a return to a place where a former or a serving staff member previously resided, the payment of the rental subsidy shall begin anew only when the staff member has been absent from the previous duty station for six months or more and where the return to the previous duty station necessitated a change of residence.

2.9 Pursuant to section 2.8 above, for former staff members who were previously in receipt of the rental subsidy and subsequently re-employed after separating from the Organization for a period of less than six months, or for serving staff members who were in receipt of the rental subsidy prior to taking up an assignment of less than six months that involved a change of official duty station, the payment of the rental subsidy shall be considered to have been suspended during the period of absence at the previous official duty station, and continued on return to the same official duty station.

Part II
Terms and conditions applicable at all duty stations

Section 3
Rent paid by the staff member

Definition

3.1 For the purposes of the present instruction, the expression "rent paid by the staff member" shall be the recurring amount indicated in the lease agreement which the staff member, as a tenant, agrees to pay for the right to live in the rented dwellings, minus all rebates and gratuities and charges towards, but not limited to, furniture, car parking and gym and/or club membership. No rental subsidy shall be paid to staff members who live in their own homes or do not pay rent for their dwellings.

Staff members' obligations

3.2 Staff members shall disclose to the Organization all rebates and gratuities granted to them by the landlord (e.g. one month's free rent, temporary reductions in rent, etc.). These reductions will be taken into account in determining the actual monthly rent paid by apportioning such rebates over the lease term of the rental.

3.3 Pursuant to sections 5.3 to 5.7 below, the staff member is required to retain, for a period of five years from the date of submission of the claim, in the original form or signed scanned copies thereof, all documentation related to the rental subsidy, including but not limited to lease agreements. The staff member will also be required to submit such documentation upon request from the Organization within 30 calendar days from the date of the request. The documentation may be requested at any time for monitoring and compliance purposes.

Sublets

3.4 Dwellings rented through a subleasing arrangement shall give rise to an entitlement to a rental subsidy provided the sublet is legal and appropriate documentation is provided by the staff member. This normally requires the prior written consent of the landlord or the appropriate legal entity.

Subsidies from other sources/sharing of rent

3.5 If the staff member receives a rental subsidy from a source other than the Organization, or shares the rent of the dwelling with someone other than the spouse or dependent children, and the lease is in the name of the staff member, the rental subsidy scheme shall apply only to that portion of the rent paid by the staff member. If the lease is not in the name of the staff member, no rental subsidy shall be paid.

One-time payment of an agent's fee

3.6 In addition to the rental subsidy for rent paid by the staff member as defined under section 3.1, a subsidy may be paid to eligible staff members in respect of a one-time payment fee paid to a licensed/registered real estate agent/broker for services rendered in obtaining accommodation at the duty station. The amount of the subsidy for such a fee shall be calculated as provided in section 4.10 below, upon presentation of appropriate documentation by the staff member. A subsidy for the agent's fee shall be paid only once during the period of a staff member's assignment to a duty station.

Requirement of residents to live in the dwelling as a condition for payment of the subsidy

3.7 The staff member who is applying for rental subsidy must occupy the dwelling on a full-time basis in order to receive a subsidy, and shall not be eligible to receive a subsidy if the dwelling is leased on a full-time or part-time basis to another person(s). If the staff member has declared in the rental subsidy application certain dependants as residing with him or her in the dwelling, these individuals must continue to reside in the dwelling as their primary residence for the duration of the lease, as a condition for the continued payment of the subsidy. The staff member shall immediately report if there is a change in residence by these individuals.

3.8 For rental subsidy purposes, a staff member's family shall be considered as comprising the spouse (whether dependent or not) and recognized dependent children actually residing with the staff member at the duty station on a regular basis. However, when a staff member's dependent children are absent from the duty station in connection with their studies, an additional bedroom for up to every two children studying away from the duty station will be added in determining the reasonable maximum rent level applicable to the staff member.

Section 4
General regime governing computation of a rental subsidy

Individual threshold

4.1 Staff members are expected to bear the rental costs, without subsidy, up to a predetermined amount called the "individual threshold". The individual threshold amount is calculated by applying percentage rates to the staff member's net income. Those percentage rates are established by ICSC for staff in receipt of a spouse or single parent allowance and for staff not in receipt of those allowances. The individual threshold of staff in receipt of transitional allowance shall be calculated by reference to the percentage rate applicable to staff not in receipt of a spouse or single parent allowance. ICSC establishes such rates on the basis of the average rent-to-income ratio at each duty station. For the purpose of the present instruction, the staff member's net income consists of the net base salary, including special post allowance, if any, post adjustment and spouse allowance or single parent allowance, as applicable.

4.2 An entitlement to a rental subsidy may arise only when the amount of rent paid by the staff member exceeds the individual threshold amount, as defined in section 4.1 above.

4.3 When a staff member is married to another staff member and both meet the conditions for the payment of a rental subsidy, the following provisions shall apply:

(a) If both spouses are eligible for the payment of a rental subsidy at different duty stations, the subsidy shall be payable to each on the basis of his or her respective income;

(b) If both spouses are eligible for the payment of a rental subsidy at the same duty station, only one subsidy shall be paid. It shall be computed on the basis of the higher of the two incomes;

(c) If only one of the spouses is eligible for the payment of a rental subsidy, only the income of the eligible staff member shall be used for computation purposes;

(d) If both spouses are eligible for the payment of a rental subsidy at the same duty station in group 1, and they arrive at that duty station at different intervals, the total period of payment of the rental subsidy shall not exceed seven years counted

from the first day following the end of the period during which the spouse who arrived first at the duty station was paid the daily subsistence allowance element of the settling-in grant.

Reasonable maximum rent level

4.4 No subsidy shall be paid for the portion of the rent paid by the staff member in excess of the reasonable maximum rent level. The reasonable maximum rent level is determined in accordance with section 12.1 for group 1 duty stations and sections 13.2 and 13.3 for group 2 duty stations and is subject to section 4.5. In the absence of information making it possible to determine the maximum reasonable rent level, a default maximum level shall be established and recorded in Umoja by the Office of Human Resources Management.

4.5 At all duty stations, an upward adjustment of 10 per cent shall be made in the applicable reasonable maximum rent level for staff at the D-1 and D-2 levels. An upward adjustment of 20 per cent shall be made for staff at the Assistant Secretary-General level and above.

Reimbursement rate

4.6 The reimbursement rates are defined by sections 12.2 and 12.3 for duty stations in group 1 and by section 13.5 for duty stations in group 2. The rental subsidy shall be computed by applying the reimbursement rates to the portion of the rent paid by the staff member or the applicable reasonable maximum rent level, whichever is lower, that exceeds the individual threshold amount calculated in accordance with sections 4.1 to 4.3.

Maximum and minimum amounts of the rental subsidy

4.7 The amount of the rental subsidy shall not exceed 40 per cent of the rent paid by the staff member, or of the applicable reasonable maximum rent level, whichever is lower. However, the 40 per cent ceiling may be waived or raised by ICSC for specific group 2 duty stations when commercial rents are considerably higher than the rental component of the post adjustment index.

4.8 For eligible internationally recruited General Service staff members, the amount of the rental subsidy shall also be subject to the maximum amounts specified in section 16.3.

4.9 No rental subsidy shall be paid if the computation made in accordance with the provisions of the present instruction results in a monthly amount equal to or lower than $10, or the equivalent amount in local currency.

Computation of the subsidy for an agent's fee

4.10 The subsidy for an agent's fee shall be computed as follows:

(a) When the amount of rent paid by the staff member does not exceed the amount of reasonable maximum rent level, the subsidy for an agent's fee shall be calculated by applying the reimbursement rate specified in section 4.6 to that part of the fee that exceeds the monthly individual threshold amount defined by sections 4.1 to 4.3;

(b) When the amount of rent paid by the staff member exceeds the amount of reasonable maximum rent level, the agent's fee shall be reduced in the proportion that the reasonable maximum rent level bears to the amount of rent paid by the staff member. The subsidy shall be calculated by applying the reimbursement rate specified

in section 4.6 to that part of the reduced fee that exceeds the monthly individual threshold amount defined by sections 4.1 to 4.3.

4.10 Notwithstanding the provision of section 4.10 above, the subsidy for an agent fee shall not exceed twice the amount of the reasonable maximum monthly rent level applicable to the staff member.

Section 5
Application for rental subsidy and self-certification

5.1 Eligible staff members shall submit their applications for rental subsidy through the employee self-service portal of Umoja and in accordance with the information circular on rental subsidies and deductions issued by the Assistant Secretary-General for Human Resources Management (ST/IC/2018/9 or as superseded).

5.2 Computation of the amount of the subsidy shall be made for the period of the validity of the lease agreement and as long as there is no change in any of the factors mentioned below. The staff member shall submit an application each time the lease is renewed. The staff member shall also submit an application as soon as any of the following changes have occurred:

(a) Change in dwelling, which includes vacating the dwelling for which the rental subsidy has been claimed;

(b) Change in the rent, as well as in rebates and gratuities, for the same dwelling;

(c) Changes in the staff member's family as defined in section 3.8.

Self-certification of rental subsidy requested by the staff member

5.3 Applications for rental subsidy require self-certification by the staff member. Self-certification is an important step in the application process, whereby the staff member assumes the responsibility for the completeness and accuracy of the data and acknowledges that he or she is aware of the requirements and of the obligations in relation to the application and the receipt of a subsidy. The self-certification mechanism recognizes that the primary responsibility for certification rests with the staff member and not the Organization. Specifically, through the self-certification mechanism, the staff member attests to:

(a) The correctness of the information he or she has provided in the application form;

(b) Understanding of the documentation requirements, as provided under section 3.3 above;

(c) Understanding of the obligation to retain the documentation for the specified period under section 3.3 and to submit it upon request for monitoring and compliance purposes;

(d) Understanding of the obligation to inform the Organization, through a rental subsidy application, of any of the changes specified in section 5.2 above;

(e) Understanding of the obligation to inform the Organization of any housing assistance received as described in section 8 of the present instruction;

(f) Understanding that the Organization may conduct a compliance review of the staff member's claim for rental subsidy;

(g) Understanding the consequences of submitting incomplete, unsubstantiated or false information as discussed in sections 5.6 and 5.7 below.

Monitoring and compliance

5.4 The offices responsible for administering staff members' entitlements will conduct periodic monitoring and compliance exercises of the claims of staff members for rental subsidy. This is done for the purpose of verifying the accuracy of the data and information provided by the staff member on his or her application for rental subsidy or deduction and ascertaining the proper use of the benefit according to the terms and conditions of the present instruction.

5.5 For the purposes of this monitoring and compliance exercise, the staff member may be requested to submit the required original documentation or signed scanned copies thereof supporting the claim for rental subsidy or deduction. Staff members are obligated to provide the requested documentation within 30 calendar days following the date of the request. As part of the monitoring process, the Organization may review the requested documentation, contact the landlord and any other individuals and verify the information in the application in any other relevant way.

5.6 Pursuant to section 5.5, failure to present the required documentation upon request, failure to report changes (such as the provision of housing assistance, change in accommodation, including vacating the dwelling for which rental subsidy has been claimed, change in the rent, changes in family size) or any act of falsification of data, fabrication or counterfeiting of supporting documentation presented in connection with the rental subsidy application may result in one or more of the following:

(a) Immediate termination of the rental subsidy;

(b) Recovery of prior subsidy payments;

(c) Any other administrative and/or disciplinary measures in accordance with staff rule 10.2, including dismissal for misconduct.

Section 6
Effective date of changes in factors used in computing a rental subsidy

6.1 Changes in the staff member's income, the threshold percentage, the reasonable maximum rent level or the reimbursement rate are accounted for automatically. When such a change occurs the resulting adjustment in the amount of the rental subsidy shall be effective as from the date of the change in the relevant factor.

6.2 When there is a change in factors other than those specified in section 6.1, the effective date of the resulting change in the amount of the subsidy shall be:

(a) The effective date of the new lease when there has been a change of dwelling;

(b) The effective date of the change in rent when there has been a change in rent for the same dwelling;

(c) The date from which a new child is recognized as the staff member's dependant when there has been an increase in the number of dependent children;

(d) The date from which there has been a decrease in the number of dependent children;

(e) The date of a staff member's marriage;

(f) The date from which a staff member's marriage has ended, he or she has legally separated or the spouse has ceased to reside with the staff member for the major part of the year.

Section 7
Payment of a subsidy

7.1 A subsidy shall be payable from the first day of the lease agreement or from the first day following the end of the period of payment of the daily subsistence allowance element of the settling-in grant, whichever is later. For staff members recruited locally at the duty station in accordance with staff rule 4.5 (b), a rental subsidy shall be paid from the first day of the corresponding appointment, provided all applicable conditions are met.

7.2 Payment shall be made on a monthly basis over the duration of the lease, or until the staff member's entitlement ceases, whichever comes first. When the subsidy is payable for part of a month, it shall be prorated in the proportion that the partial month bears to the full calendar month.

7.3 The subsidy shall normally be paid in United States dollars. Should the staff member request payment of salary and allowances in another currency in accordance with the rules governing the currency of payment of salaries and allowances,[1] the payment of the subsidy shall be made at the United Nations operational rate of exchange prevailing on the date the payment is made. No adjustment shall be made to account for changes in exchange rates once the payment has been made.

Section 8
Rental deductions

8.1 Staff members who receive housing assistance, whether from the Organization or another entity, including a Government, either housing free of charge or housing at rents substantially lower than the average rent used in calculating the post adjustment index for the duty station, shall normally be subject to rental deductions from their salaries through payroll.

8.2 The amount of the rental deduction shall be equal to 80 per cent of the difference between the rent paid by the staff member and the individual rental deduction threshold, which is an amount equal to 64 per cent of the individual threshold amount, as defined in section 4.1 above. The amount of the rental deduction may be reduced or waived in accordance with section 8.3.

8.3 If the housing provided by the Organization or another entity, including a Government, is clearly below standard, the amount of the rental deduction may be reduced as per the criteria and rates set out in annex II to the present instruction. Upon the recommendation of the designated official at the duty station, the Assistant Secretary-General for Human Resources Management may authorize a waiver of the rental deduction if the exceptional criteria in annex II are satisfied.

8.4 For rental deduction purposes, staff members shall be required to report and certify at the time of recruitment whether they receive housing assistance or free accommodation provided by the Organization or another entity, including a Government.

8.5 In accordance with staff rule 1.5, staff members have the obligation to inform the Organization of any change in the situation as reported at the time of recruitment if this would have an effect on their status or entitlements. Failure to report such a change in a timely manner will result in recovery of overpaid amounts and any other appropriate action, as provided for in section 5.6 above.

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[1] ST/AI/2001/1, entitled "Currency and modalities of payment of salaries and allowances", or any subsequent instruction on this subject.

Section 9
Relationship with other elements of the system of salaries, allowances and other benefits

Rental subsidies and deductions have no effect on other elements of the system of salaries, allowances and grants. The rental subsidy is non-pensionable and is not taken into account in determining separation payments. A staff member's income for the purpose of determining insurance premiums and subsidies shall not be considered as affected by rental subsidies or rental deductions.

Part III
Additional terms and conditions for rental subsidy at group 1 duty stations

Section 10
Special eligibility requirements

10.1 A rental subsidy may be paid to eligible staff members at group 1 duty stations provided they are in one of the following categories:

(a) Newcomers, that is, newly appointed staff members and staff members transferred or reassigned from another duty station;

(b) Staff members affected by force majeure, that is, staff members who are forced to change dwelling owing to circumstances beyond their control. The situations under which staff members may qualify for rental subsidy under force majeure shall be limited to the following:

(i) Demolition of the dwelling, extensive damage or lack of access to the dwelling owing to elements beyond the control of the staff member;

(ii) Forced eviction/repossession by the landlord through legal proceedings;

(iii) Conversion of the dwelling from rental to cooperative or condominium;

(c) Only one change in dwelling is allowed under force majeure for a staff member in the course of a continuous assignment at the same official duty station. The subsidy shall be discontinued in case of any subsequent change of dwelling.

10.2 A rental subsidy shall not be paid pursuant to section 10.1 (b) (ii) above where the forced eviction is the result of a breach of the staff member's obligations under the terms of his or her lease.

10.3 Staff members are required to submit appropriate documentation attesting to the circumstances listed in section 10.1 (b) (i)–(iii) above in order to determine eligibility for a rental subsidy under force majeure.

Section 11
Duration of a rental subsidy

11.1 A rental subsidy may be paid to eligible staff members at group 1 duty stations for the following periods:

(a) For newcomers, seven continuous years counted from the first day following the end of the period during which the staff member was paid the daily subsistence allowance element of the settling-in grant received on arrival at the duty station. For staff members recruited at the duty station who did not receive a settling-in grant on appointment, the seven-year period shall be counted from the date of the initial arrival at the duty station;

(b) In cases of force majeure, five years counted from the first day of the new lease after the occurrence of the force majeure.

11.2 Staff members on special leave with pay will continue to receive rental subsidy, subject to eligibility, for the maximum period of seven years.

11.3 Staff members on special leave without pay will not receive rental subsidy for the period they are on special leave without pay. Eligibility for rental subsidy may resume upon submission of a new application upon return from special leave without pay. Periods of special leave without pay will suspend the computation towards the maximum period of seven continuous years.

11.4 When a staff member in receipt of the rental subsidy as a newcomer is affected by force majeure:

(a) During the first two years following arrival at the duty station, he or she shall continue to receive the rental subsidy for a total period of seven years, at the rates for newcomers set out in column A of the table in section 12.2 below;

(b) After two years or more following arrival at the duty station, he or she shall receive the subsidy at the rates set out in column B of the table in section 12.2 for staff members affected by force majeure, provided, however, that the entire period of payment of the subsidy, either as a newcomer or under force majeure, does not exceed seven years.

Section 12
Computation of a rental subsidy at group 1 duty stations

Determination of a reasonable maximum rent level

12.1 The reasonable maximum rent level referred to in section 4.4 above for group 1 duty stations is set based on the family size of the staff member and a survey of rent levels in the local market. Levels of reasonable maximum rent for New York are set out in annex IV to the information circular on rental subsidies and deductions (ST/IC/2018/9 or as superseded). Local circulars are issued at other duty stations by the authorized official, setting out the reasonable maximum rent levels applicable at the duty station concerned.

Reimbursement rate

12.2 In accordance with section 4.4 above, the reimbursement rate determined on the basis of the following table shall be applied to that portion of the rent paid by the staff member that exceeds the individual threshold amount as defined in section 4.1, up to the reasonable maximum rent level determined by application of sections 4.5 and 12.1.

Year	*A* *Newcomers (percentage)*	*B* *Staff members affected by force majeure (percentage)*
1	80	80
2	80	80
3	80	60
4	80	40
5	60	20
6	40	–
7	20	–

12.3 When electricity charges are included in the rent, the following amounts, or equivalent in local currency, shall be deducted from the total monthly rent payable to determine the amount of rent to be used for purposes of determining the rental subsidy: studio or one-bedroom dwelling, $30; two-bedroom dwelling, $40; three-bedroom dwelling, $50; four-bedroom dwelling, $60; and dwelling with five or more bedrooms, $70.

Maximum amount of the rental subsidy

12.4 In accordance with section 4.7, the rental subsidy paid to a staff member shall not exceed 40 per cent of the rent paid by the staff member, or 40 per cent of the applicable reasonable maximum rent level determined in accordance with sections 4.4, 4.5 and 12.1, whichever is lower.

Part IV
Additional terms and conditions for rental subsidies at group 2 duty stations

Section 13
Computation of rental subsidy at group 2 duty stations

13.1 Except as provided in sections 14 and 15, the computation of rental subsidy at group 2 duty stations shall be governed by sections 13.2 to 13.5.

Determination of a reasonable maximum rent level

13.2 The reasonable maximum rent level referred to in section 4.4 above for group 2 duty stations is set based on the determination as to whether, given the local market conditions, the rental payments are reasonable or substantially higher than rents for dwellings of similar quality and size. Such determination, to be certified by the authorized official, shall be made in accordance with the criteria set out in annex I to the present instruction.

13.3 When it is determined that the rental payments are substantially higher than rents for dwellings of similar quality and size at the duty station, the amount of the subsidy shall be calculated on the basis of the highest of the rents paid by staff members with similar family circumstances for dwellings certified as reasonable at the duty station.

13.4 In group 2 duty stations where the United Nations country team has established maximum reasonable rental levels, those levels should be used when determining the reasonableness of the rental payments in the rental subsidy application.

Reimbursement rate

13.5 The reimbursement rate for the computation of a rental subsidy at group 2 duty stations shall be 80 per cent of that portion of the rent paid by the staff member that exceeds the individual threshold amount, provided the rent paid by the staff member does not exceed the reasonable maximum rent level determined in accordance with sections 13.2 and 13.4.

Duration of rental subsidy

13.6 Staff members may continue to receive rental subsidy without a specified time limit, subject to eligibility.

13.7 Staff members on special leave with pay will continue to receive rental subsidy, subject to eligibility.

13.8 Staff members on special leave without pay will not receive rental subsidy for the period they are on special leave without pay. Eligibility for rental subsidy may resume upon submission of a new application upon return from special leave without pay, subject to eligibility.

Section 14
Modified rental subsidy at certain duty stations

14.1 At duty stations where the rental threshold is based on low, government-provided housing costs, a modified rental subsidy formula shall apply, whereby those staff members who are obliged to pay extremely high rents on the commercial market shall be reimbursed the sum of (a) 80 per cent of the difference between the average commercial rent and the applicable individual threshold and (b) either 90 or 95 per cent of the difference between the rent paid by the staff member and the average commercial rent.

Section 15
Combined rent

15.1 When eligible staff members are assigned to a duty station outside the capital city of the country of the duty station, their rental expenses at the duty station, if any, and the rental paid for the family's accommodation at another location in the country of the duty station may be considered as a single rent for the purposes of the rental subsidy, subject to the following conditions:

(a) The staff member is obliged to rent accommodation at both locations;

(b) In the opinion of the Secretary-General, the duty station where the staff member is assigned lacks schools and/or medical facilities appropriate to the needs of the staff member's family;

(c) The staff member's family has travelled at the expense of the Organization to the country of the duty station and settled in the capital city or another city in the country of the duty station with appropriate educational and/or medical facilities.

15.2 The combined rent mechanism under section 15.1 shall not apply in the following situations:

(a) When the staff member's family is left in the home country or in a third country;

(b) When the staff member's family is settled at locations in the country of the duty station other than the staff member's duty station for reasons not related to the education or health care of the family members;

(c) When the staff member is assigned to a non-family duty station. In such cases, a rental subsidy shall be paid only in respect of accommodation rented by the staff member at the duty station.

Part V
Additional terms and conditions applicable to internationally recruited General Service staff members

Section 16
Rental subsidy for internationally recruited General Service staff

16.1 Internationally recruited General Service staff shall be eligible for a rental subsidy when the following conditions are met:

(a) They do not receive a non-resident's allowance under the transitional measures established in staff rule 13.8 for staff in receipt of such an allowance on 31 August 1983;

(b) Their nationality, within the meaning of staff rule 4.3, is other than that of the country of the duty station, and they do not have permanent resident status in that country.

16.2 Except as provided for in section 16.3, the terms and conditions for the payment of a rental subsidy to eligible internationally recruited General Service staff members shall be those set out in the present instruction.

16.3 Eligible staff members will receive rental subsidy in the form of a flat sum of $200 per month for staff members without a dependent spouse or child and $250 per month for staff members with such a dependant.

Section 17
Final provisions

17.1 The present administrative instruction shall enter into force on 1 January 2018.

17.2 Administrative instruction ST/AI/2013/2/Rev.1 is hereby abolished.

(*Signed*) Jan **Beagle**
Under-Secretary-General for Management

Annex I

Certification criteria for purposes of determining the reasonable maximum rent level at group 2 duty stations (sections 13.2 and 13.3 of the instruction)

For the purpose of certification, at each duty station dwellings are grouped in three categories, as follows:

A. Reasonable

If a dwelling occupied by a staff member is similar in quality and size by reference to those occupied by other staff members at the same duty station having a family of the same size and if the rental follows a general pattern of rents for dwellings of similar quality and size, then the dwelling in question should be certified as "reasonable". It must be noted, however, that if a staff member has no alternative but to occupy a dwelling that is larger or better in quality in relation to those occupied by other staff members with similar family size or if the rent is very high in comparison with other dwellings of similar size because of unavailability of other suitable accommodations, then the dwelling must still be certified as "reasonable".

B. Above average

If a staff member occupies a dwelling that is substantially larger or better in quality in relation to those occupied by other staff members with the same family size, resulting in higher rental payments, then the dwelling should be certified as "above average". In this case, the highest rent paid by a staff member from among those with similar family circumstances and living in dwellings certified as "reasonable" must be used for the calculation of rental subsidies.

C. Substandard

Dwellings provided either free of charge or at a nominal cost which are of poor quality fall within this category. Dwellings of this type lack the minimum acceptable standard of construction and/or one or more of the basic amenities. It should be noted that the category "substandard" applies also to dwellings in capital or other major cities.

Annex II

Reductions or waiver of rental deductions

In case of substandard accommodations provided free of charge or at a nominal cost by the United Nations or another entity, including a Government, the deductions referred to in section 8.3 of the present instruction shall be computed as follows:

1. The rental deduction will be reduced by 50 per cent for the following types of accommodation:

(a) Standard hotel or guest house accommodation; or

(b) House or villa where staff members have their own bedroom but share a bathroom, living space or kitchen.

2. The rental deduction will be reduced by 75 per cent for the following types of accommodation:

(a) Prefabricated container accommodation;

(b) Barracks or dormitory type of accommodation, including where staff members have a single bedroom but share bathroom facilities;

(c) Where staff members do not have a dedicated work space and are required to work out of their accommodation; or

(d) Any type of accommodation where staff members are required to share a bedroom.

3. A full waiver of the rental deduction shall be granted upon the recommendation of the designated official at the duty station and with the authorization of the Assistant Secretary-General for Human Resources Management for the following types of accommodation:

(a) Tented accommodation;

(b) Accommodation partially or entirely underground or fully covered with protective material, resulting in a bunker-like environment; or

(c) Where staff members are required to sleep in their office.

United Nations ST/AI/2018/4

Secretariat

26 January 2018

Administrative instruction

Medical clearances

The Under-Secretary-General for Management, pursuant to section 4.2 of Secretary-General's bulletin ST/SGB/2009/4 and for the purpose of establishing conditions and procedures for medical clearance in order to implement staff regulation 4.6 and staff rule 4.19 and for official travel, promulgates the following:

Section 1
General provisions

Purpose

1.1 The purpose of medical clearance is to ensure that staff are physically and mentally fit to perform their designated functions without risk to the safety and health of themselves or others, considering their health status, the job demands, and the health risks and health support available at the location in which they are to serve.

Medical evaluation

1.2 The United Nations Medical Director will determine the requirements for medical clearance, which may include a health statement, medical history, physical examination, diagnostic testing and review of relevant medical reports. Medical clearance for travel may require vaccinations, medications and health information briefings, as determined by the United Nations Medical Director.

1.3 When required to provide a health statement, candidates for employment and staff members will attest to:

(a) The correctness of the information they have provided; and

(b) Their understanding of the consequences of submitting false information, as set out in section 1.4 below.

1.4 Acts of misrepresentation, falsification of data, fabrication or counterfeiting of supporting documentation presented in connection with the medical clearance process may result in administrative and/or disciplinary measures in accordance with staff rule 10.2, including dismissal for misconduct.

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Section 2
Medical clearance for employment

Validity of medical clearance for employment

2.1 Medical clearance for employment is valid for three months and for the duty station and job type for which it was granted.

2.2 Where candidates for employment or staff members are not granted medical clearance, they shall be considered as not having fulfilled the requirements set out in section 1 above and may not be recruited, assigned, reassigned or transferred to the duty station or be designated to perform the functions for which medical clearance was sought.

Medical clearance for initial appointment

2.3 Initial appointments, regardless of duration, shall require medical clearance, as determined by the United Nations Medical Director.

Medical clearance after initial appointment

2.4 Medical clearance after initial appointment is required in the following situations:

(a) When a staff member is assigned, reassigned or transferred to a duty station where the conditions, including the unavailability of adequate medical facilities, present health risks;

(b) When there is a significant change in the physical or mental requirements for the staff member's designated job functions;

(c) When it is part of a periodic review process, in accordance with requirements determined by the United Nations Medical Director;

(d) When required by the United Nations Medical Director following a period of sick leave.

2.5 In addition, staff members may be required to undergo medical evaluation when so directed by a duly authorized health-care professional.

Authority to grant medical clearance for employment

2.6 Medical clearance for employment is granted by a duly authorized health-care professional of the medical service at the duty station where the staff member is to serve. If there is no authorized health-care professional at the duty station, medical clearance is granted by the medical service specified by the United Nations Medical Director. The medical clearance may include, where appropriate, specific employment restrictions and recommendations on reasonable accommodation related to a recognized disability.

Exit medical evaluation

2.7 Without prejudice to the provisions of appendix D to the Staff Rules, an exit medical evaluation may be required when specific circumstances indicate that the health of the departing staff member may have been affected by a medical condition attributable to the performance of official duties on behalf of the United Nations.

Section 3
Medical clearance for official travel

Validity of medical clearance for official travel

3.1 Medical clearance for official travel is valid for the requested travel dates and destination(s).

3.2 Where staff members are not granted medical clearance for official travel, they shall be considered as not having fulfilled the requirements set out in section 1 above and may not travel to the duty station for which the medical clearance was sought. Travel undertaken without medical clearance may lead to the exclusion of compensation claims under article 2.3 (a) of appendix D to the Staff Rules.

Official travel subject to medical clearance

3.3 Medical clearance for official travel, as referred to in section 3.4 below, is required when either the nature of the travel or the conditions at the destination, including the unavailability of adequate medical facilities, present health risks to staff members. The United Nations Medical Director shall establish in which cases medical clearance for travel must be obtained and under what conditions it will be granted.

3.4 Medical clearance may be required for official travel on:

(a) Initial appointment;

(b) Official business;

(c) Change of official duty station.

Authority to grant medical clearance for official travel

3.5 Medical clearance for official travel, including travel on change of official duty station, is granted by a duly authorized health-care professional of the medical service at the duty station where the staff member is currently assigned. If there is no authorized health-care professional at the duty station, medical clearance is granted by the medical service specified by the United Nations Medical Director.

Section 4
Entry into force

4.1 The present administrative instruction shall enter into force on the date of its issuance.

4.2 Administrative instruction ST/AI/2011/3 of 14 April 2011 is hereby superseded.

(*Signed*) Jan **Beagle**
Under-Secretary-General for Management

United Nations ST/AI/2018/5

Secretariat

8 February 2018

Administrative instruction

Listing and recognition of academic degrees

The Under-Secretary-General for Management, pursuant to section 4.2 of Secretary-General's bulletin ST/SGB/2009/4, and for the purpose of setting out the Organization's policy concerning how academic qualifications are recognized by the Organization and should be listed by staff members in their applications and official records, hereby promulgates the following:

Section 1
Scope

The present instruction applies to all United Nations staff members who list academic qualifications, especially post-secondary qualifications such as a first-level university degree (i.e. bachelor's degree or equivalent) or an advanced degree (i.e. master's degree, doctoral degree or equivalent) (collectively referred to as "degrees") in their job applications or official records. All staff members are instructed to confirm the applicability of the present instruction to their specific situation and to take action accordingly when required.

Section 2
Recognition of academic degrees by the Organization

2.1 The Assistant Secretary-General for Human Resources Management shall determine whether an academic qualification or its equivalent will be recognized by the Organization. Academic qualifications and equivalent degrees presented by candidates are recognized by the Organization only where the qualification is obtained from, and the equivalent confirmed by, an educational institution that is recognized, accredited or otherwise sanctioned by competent national authorities of the country in which the institution is based or the qualification was awarded.

2.2 A "recognized degree" is a degree that was accredited, at the time of its issuance, by the competent authority in the country in which the issuing institution is based.

2.3 The Organization will not recognize a degree that has been awarded by a programme requiring minimal or no coursework or awarded on the basis of the payment of fees rather than in recognition of genuine coursework.

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Section 3
Listing of degrees in job applications and official records

3.1 Staff members shall not list or otherwise rely upon the following degrees in a job application or official record:

(a) A degree that is not recognized pursuant to section 2.2 above, except where the staff member has requested a review of the degree pursuant to sections 4.3 and 4.4 below and clearly indicates that the review is pending;

(b) Incomplete degrees,[1] unless clearly marked as such;

(c) A degree that was not awarded; or

(d) A degree within the meaning of section 2.3.

3.2 To confirm whether an institution or a degree is accredited, staff members may refer to the World Higher Education Database compiled by the International Association of Universities ("IAU list").[2] Since the list reflects institution and degree accreditation at the time of publication, a degree and/or institution may not be listed in the most recent publication of the IAU list. In this case, staff members may also refer to prior publications of the IAU list.

3.3 Listing a degree as defined in section 3.1 (a) to (d) or misrepresentation of receipt of a degree may result in administrative and/or disciplinary measures, including dismissal, pursuant to staff rule 10.1.

Section 4
Obligation to confirm that degrees are recognized and requests for review

4.1 Staff members have the obligation to ensure that degrees listed in their job application or referred to in their official record are recognized degrees in accordance with section 2.2 and that the listing of each degree is in compliance with section 3.1.

4.2 Staff members serving on the date of issuance of the present administrative instruction who are unsure as to whether their degree meets the requirements of a recognized degree shall, as soon as possible and no later than six months from the date of issuance of the present instruction, contact the institution that issued their degree or the accreditation authority in the country in which the institution is based, in order to request confirmation that the degree was accredited at the time of its issuance. Before receiving confirmation of the accreditation of the degree, staff members may list the degree but should indicate that the review of the confirmation of the accreditation is pending. Staff members may not submit degrees as defined in section 2.3 for confirmation or accreditation. If they do so and it is later determined that the degrees fall under the definition of section 2.3, staff members will not be covered by the provisions of section 6.4 and will be subject to administrative and/or disciplinary measures.

4.3 If no reply is received from the institution or accreditation authority within three months of the date of enquiry, such staff members shall contact their Executive Office or local human resources office and request official review to have the accreditation of the degree confirmed by the Office of Human Resources Management.

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[1] An incomplete degree is a degree for which the staff member has done partial coursework or coursework is ongoing, or for which coursework has been satisfactorily completed but the award of the degree is pending.

[2] A recent version of the IAU list may be searched on the online Inspira platform through the "Main menu" feature, under "Self-service", "Recruiting", "Academic degrees database".

4.4 Such request for review must include the reasons why the degree should be recognized by the accreditation authority, and its equivalent, as well as a copy of the degree and the official transcript; documentation of the attempt(s) to contact the institution or the accreditation authority; and any other relevant documentation that may facilitate the review. Staff members may be required to provide the documentation in one of the six official languages of the United Nations.

4.5 The Executive Office or local human resources office will contact the relevant accreditation authority and submit the response to the Assistant Secretary-General for Human Resources Management for determination whether the degree is a recognized degree. While the review is pending, the staff member may continue to list the degree(s) in job applications but should indicate that the review of confirmation of the accreditation is pending. This caveat can be removed only when the review by the Executive Office or local human resources office and the Office of Human Resources Management has been completed.

Section 5
Interim provisions for staff with pending accreditation review

Staff members serving on the date of issuance of the present administrative instruction who inform the Executive Office or local human resources office in writing in accordance with section 4.3 above and list their degree as pending accreditation review may:

(a) Remain in their current position and at their current level; and

(b) Apply and be considered and selected for other positions at their current level or at a higher level.

Section 6
Outcome of the review

6.1 Upon completion of the review specified in section 4.5, staff members will be notified in writing of the outcome of the review. The notification will be included in their official status file.

6.2 If the degree is recognized, staff members may list their degree and its equivalent as indicated in the notification and are no longer required to include the caveat that it is pending review.

6.3 If the degree is not recognized following the review specified in section 4.5, the staff member must remove the degree from the official record and may not list the degree in job applications. Failure to comply with this instruction may result in administrative and/or disciplinary measures, including dismissal, pursuant to staff rule 10.1.

6.4 As a one-time amnesty for staff members who have requested a review in accordance with sections 4.4 and 4.5, if the degree is not recognized and the staff member has no other recognized degree required to meet the minimum academic qualifications for the encumbered position, the staff member may remain in that current position and level. The Office of Human Resources Management will also consider the staff member as having the minimum academic qualification to apply and be considered and selected for other positions at that current level if the staff member satisfies all other minimum requirements. However, the staff member shall not be eligible to apply for job openings at a higher level until the staff member meets the minimum required academic qualifications with a recognized degree.

6.5 For all staff members, listing a degree that is not recognized may result in administrative and/or disciplinary measures, including dismissal, pursuant to staff

rule 10.1. However, a degree that is not recognized may be listed in specific circumstances when the Office of Human Resources Management has considered that the staff member possesses the minimum academic qualification as set out in section 6.4.

Section 7
Final provisions

The present administrative instruction enters into force on the date of its issuance.

(*Signed*) Jan **Beagle**
Under-Secretary-General for Management